Subsidized Guardianship Initial Determination & Case Creation

Note: Assignment to the family case is needed in order to document work (except for imaging).

Note: **DO NOT** close the Out of Home Placement under the family case as this will prevent deactivation and not allow the Subsidized Guardianship case to be created.

Introduction

Establishing Subsidized Guardianship for a child consists of multiple steps; from the documentation of initial eligibility to Subsidized Guardianship case creation, and includes continued program eligibility determination(s) and documentation. The following guide addresses the Initial Subsidized Guardianship Eligibility determination on the family case through the deactivation and creation of the child's Subsidized Guardianship case.
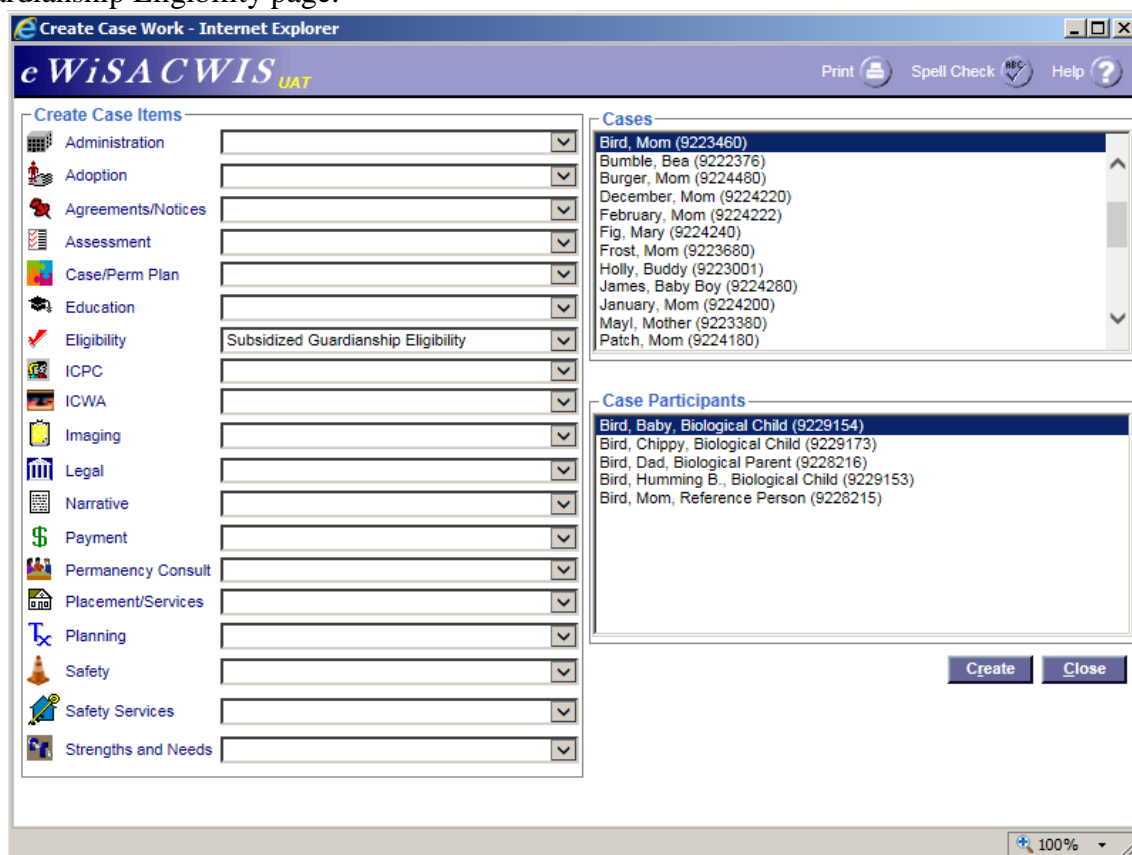
Related User Guides:

Reopening a Subsidized Guardianship Agreement Ended in Error
Subsidized Guardianship Amended Agreement
Subsidized Guardianship Continued Eligibility and Related Notices and Decisions

Documenting an Initial Subsidized Guardianship Determination

1. From the desktop, select Create > Case Work or click the Case Work button [Case Work] to open the Create Case Work page.

2. On the Create Case Work page, go to Eligibility and select 'Subsidized Guardianship Eligibility' from the drop-down. Select the case and participant and click Create to open the Subsidized Guardianship Eligibility page.

3. Click Insert on the Eligibility History tab of the Subsidized Guardianship Eligibility page to open and create the Initial Subsidized Guardianship Eligibility Determination.

4. On the Subsidized Guardianship Eligibility Determination page, select 'Initial' from the Type of Determination drop-down and enter an Effective Date.

5. Make the appropriate Yes or No selection for each question. Associated narrative text fields are only required when a question is answered Yes.

Note: If the child is not an Indian child, Question 3 will be ignored when determining the Subsidized Guardianship eligibility status.

Note: If the child is under the age of 14, Question 6 will be ignored when determining the Subsidized Guardianship eligibility status.

6. Once all of the questions are answered, click Save. The Eligibility Status will be updated to either 'Eligible' or 'Not Eligible.'

Note: If the Eligibility Status remains as 'Pending' after save, check that all questions and associated information have been entered.

7. After the Eligibility Status has been updated, select the 'SG Eligibility Determination and Permanency Plan Addendum' from the Options drop-down on the bottom of the page and click Go to launch the template. Most information prefills from the Eligibility Determination. Once complete, print the template. Click Close and Return to eWiSACWIS to return to the Subsidized Eligibility Determination page.

8. Next, send the Eligibility Determination for approval by selecting 'Approval' from the Options drop-down and clicking Go. On the Approval History page, select the Approve radio button and click Continue to return to the Subsidized Guardianship Eligibility Determination page. Click Save on the Subsidized Guardianship Eligibility page to send the determination for approval.

Note: Prior to supervisor approval a determination is available to Edit. Once approved, a View hyperlink appears to view the Subsidized Guardianship Eligibility information associated with that determination.

9. Click Close on the Subsidized Guardianship Eligibility page to return to the desktop.

10. Upon approval, a Subsidized Guardianship Eligibility hyperlink displays for the child under the Eligibility section on the family case and reflects the appropriate status; 'Eligible' or 'Not Eligible'.
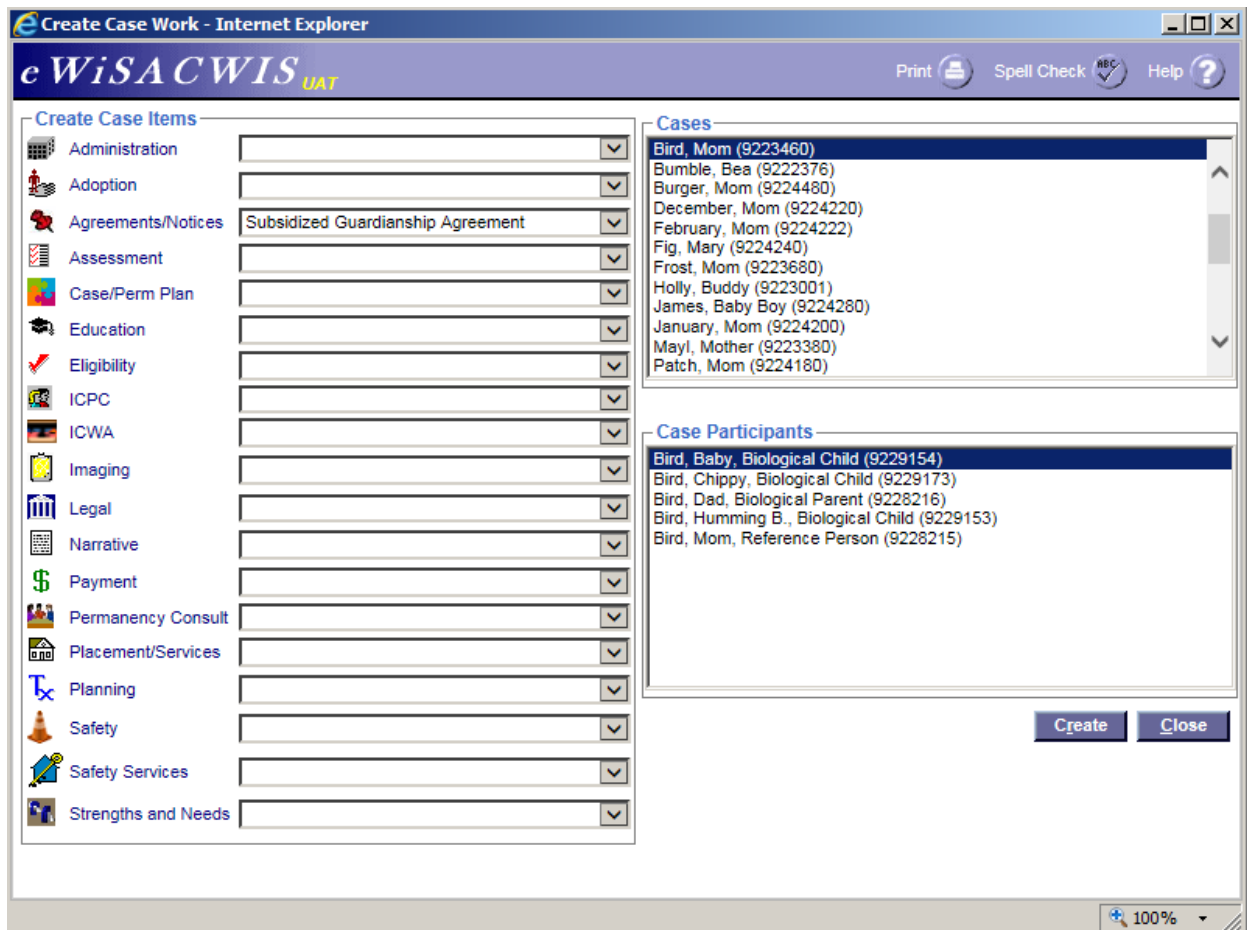
Creating a Subsidized Guardianship Agreement

Note: The Eligibility Status of the Initial Subsidized Guardianship Eligibility Determination must be 'Eligible' in order to create the agreement.

Note: The agreement can only be created in a) the case that houses the Out of Home Placement and b) only if a CANS and Foster Care Rate (except Level 1) are completed and approved for that Out of Home Placement.

1. From the desktop, select Create > Case Work or click the Case Work button [Case Work] to open the Create Case Work page.

2. On the Create Case Work page, select 'Subsidized Guardianship Agreement' from the Agreements/Notices drop-down. Select the Case and Participant and click Create to open the Subsidized Guardianship Agreement page.

3. Enter information for the Subsidized Guardianship Agreement. The agreement is divided into the following group boxes: Agreement Information, Supplemental Rate, and Payment Information. The following describes both pre-filled and user entered fields for each group box.

A. Agreement Information
- Case Participant: Prefills with the child's name as a hyperlink (to Person Management).

- Date of Agreement: User entered date (Date of Subsidized Guardianship court hearing).

- Agreement Type: Defaults to Subsidized Guardianship Agreement.

- Estimated End Date: Prefills the date of the child's 18th birthday.

- Provider Name: Pre-fills the current provider's name as a hyperlink (to Provider Management).

- Agreement Amount: Prefills with the total of the Basic, Supplemental, and Exceptional amounts.

Note: There is a separate rate algorithm from CANS for foster care and subsidized guardianship. As a result, there may be a slight difference in the total Agreement Amount.

- County: Prefills County.

- Successor Guardian 1 & Successor Guardian 2: If named, enter in the appropriate field.

B. Supplemental Rate:

- Prefills information from the child's most recently approved CANS linked to the child's most recently approved placement.

Note: There is a separate rate algorithm from CANS for foster care and subsidized guardianship. As a result, there may be a slight difference in the supplemental points and supplemental rate.

C. Payment Information:

- Basic Rate: Prefills basic rate based on the age of the child at the time of the agreement.

- Supplemental: Prefills amount based on the most recently approved CANS.

- Exceptional: If applicable, select the Exceptional checkbox and enter an amount. Provide an explanation in the Payment Justification narrative box. Refer to policy for details on acceptable justifications.

Note: Supplemental and Exceptional amounts are only available if the provider listed on the agreement is a Level 2+.

4. Once all information is entered, select 'Subsidized Guardianship Agreement' from the Options drop-down and click Go to launch the template.

5. Most information prefills from the Subsidized Guardianship Agreement to the template. Once complete, print the template. Click Close and Return to eWiSACWIS to return to the Subsidized Guardianship Agreement page.

6. Next, send the agreement for supervisory approval by selecting 'Approval' from the Options drop-down and clicking Go. On the Approval History page, select the Approve radio button and click Continue to return to the Subsidized Guardianship Agreement page. Click Save to send for approval.

Note: Upon approval of the agreement, a Subsidized Guardianship service type for the provider (if open) will be automatically added. If the provider record is not open, the service will need to be manually added.

Note: Once the child is deactivated from the biological family case, an overnight process will use the agreement information to setup the effective date, provider, and payment amount in the Subsidized Guardianship case.

7. Click Close on the Subsidized Guardianship Eligibility page to return to the desktop.

8. When the desktop is refreshed, a Subsidized Guardianship Agreement hyperlink displays for the child under the Agreements and Notices section of the family case.

Creating a Legal Action Record for Subsidized Guardianship

1. From the desktop, open the child's Legal Record on the family case.

   Note: See the Legal Record User Guide if a Legal Record needs to be created.
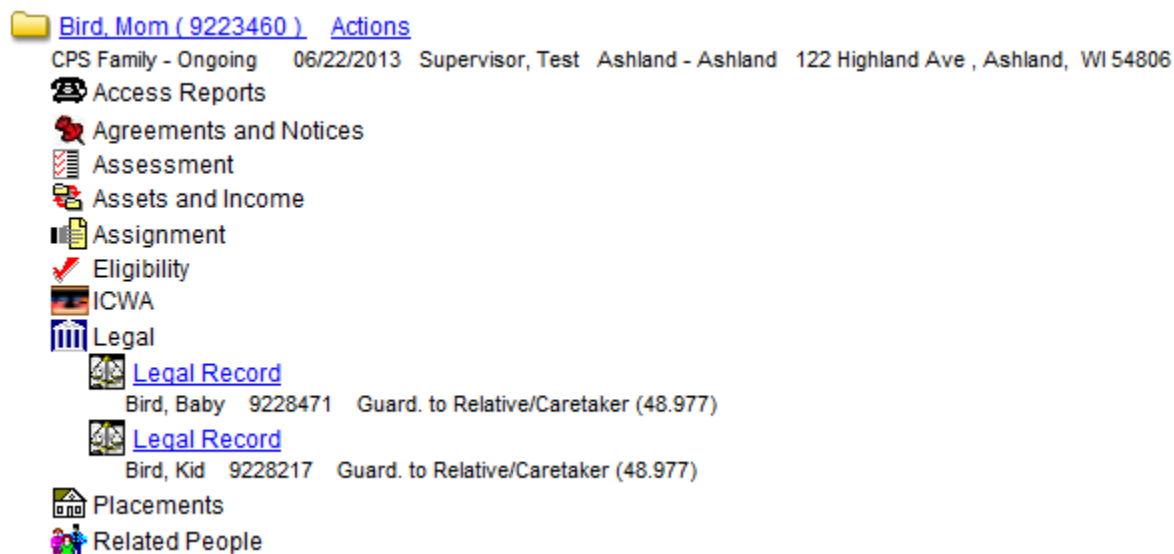
2. On the Legal Record page, click Create Legal Action.

3. On the Legal Action Copy page, click Create to open a new Legal Action.

4. On the Legal Action page, enter data in the required fields. Click Save when complete. Click Close to be returned to the Legal Record page.

   Note: For Subsidized Guardianship case creation the Legal Action Initiated should be 'Subsidized Guardianship'.

5. On the Legal Record page, click the Create Legal Status hyperlink next to the Subsidized Guardianship Legal Action to open the Legal Status Copy page.

6. On the Legal Status Copy page, click Create.

7. Enter the required fields. For Subsidized Guardianship case creation, the child's legal status record on the biological family case must have a legal status record that has a) Legal Action as 'Subsidized Guardianship,' b) New Legal Status as 'Guard. To Relative/Caretaker (48.977),' and c) Result as 'Petition Granted.' Click Save when completed. Click Close to return to the Legal Record page.

8. The Legal Record entry is now complete.
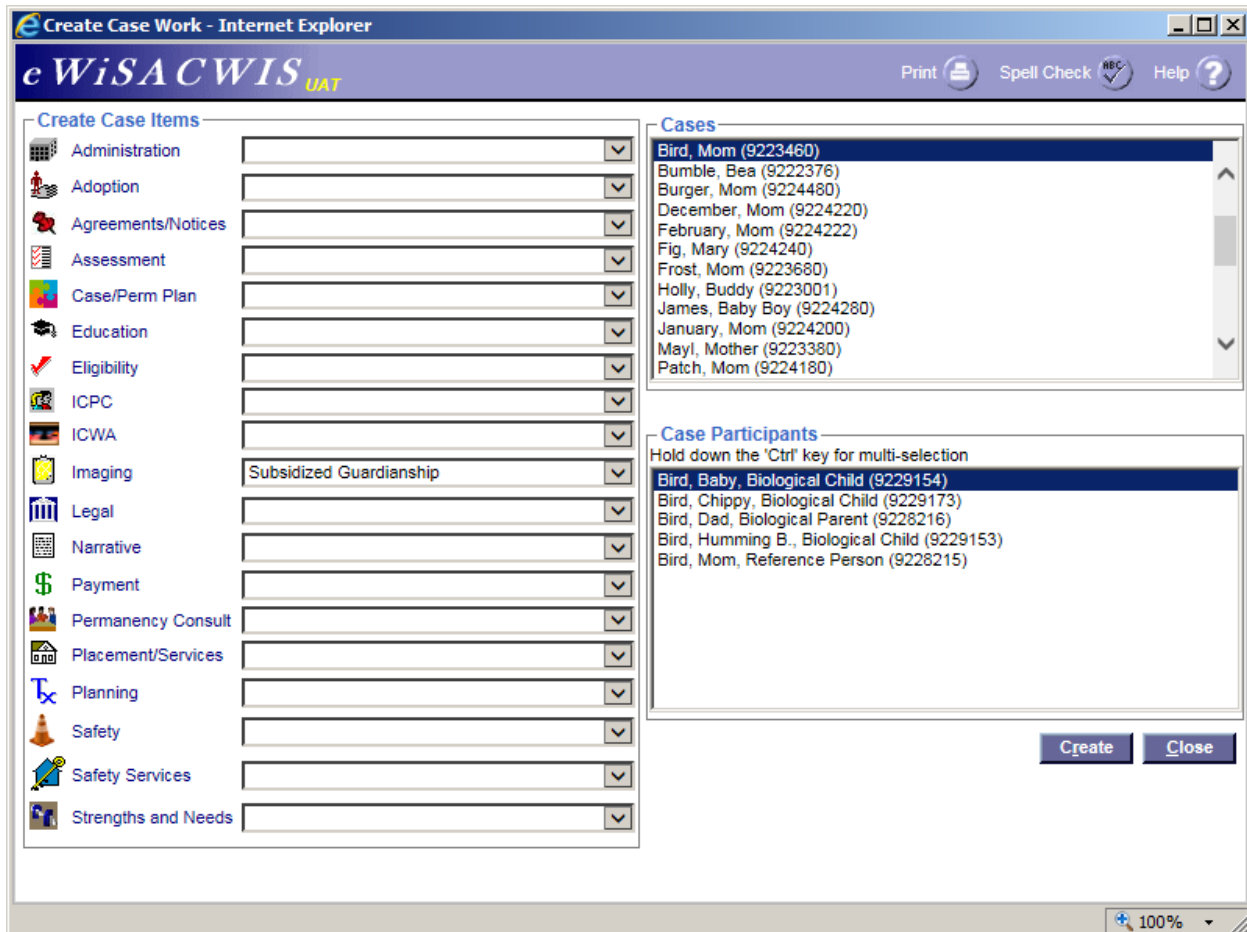
9. Click Close on the Legal Record page to return to the desktop.

Creating Imaging Records for Subsidized Guardianship

Note: The Imaging page can also be accessed via the desktop Menu>Utilities> Imaging Search page, which does not require an assignment to the case.

1. From the desktop, select Create > Case Work or click the Case Work button [Case Work] to open the Create Case Work page.

2. On the Create Case Work page, select 'Subsidized Guardianship' from the Imaging drop-down. Select the Case and Participant. Click Create to open the Imaging page.

3. There are 5 required Subsidized Guardianship documents: BadgerCare+/Medicaid Health Insurance Form (F-10115), Guardianship Order, Initial Court Order, Most Recent Court Order, and Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E).

   Note: For Subsidized Guardianship, the BadgerCare+/Medicaid Health Insurance Form (F-10115), Guardianship Order, and Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E) imaging records must be created with a Date of Document that falls within the past 6 months prior to deactivating the child to create the Subsidized Guardianship case.

Deactivating a Child Due to Subsidized Guardianship

IMPORTANT: DO NOT close the Out of Home Placement under the family case as this will prevent deactivation and not allow the Subsidized Guardianship case to be created. Overnight processing closes the Out of Home Placement.

Note: In the event that the child is currently residing in another state or is moving out of state, cancel the Medicaid Eligibility Certification **prior to deactivating** the child for Subsidized Guardianship. Contact the WI Medicaid Specialist at (866) 666-5532 to coordinate benefits in that state.

1. From the desktop, click the family case name hyperlink to open the Maintain Case page.
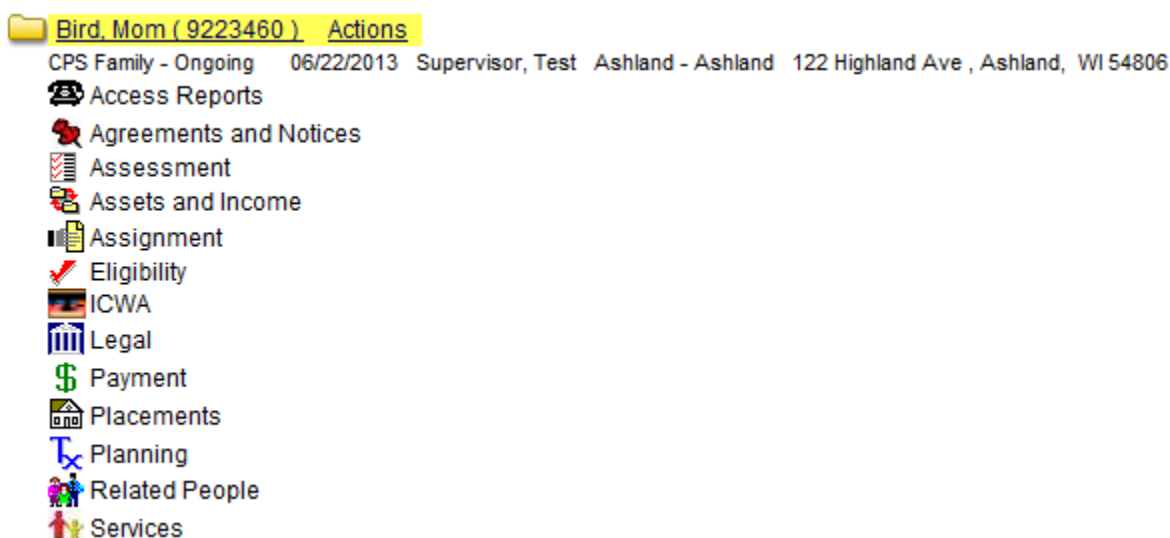
2. Click the DeAct hyperlink for the child to be deactivated to open the Participant Status pop-up page.

3. On the Participant Status pop-page, select 'Subsidized Guardianship' from the Reason drop-down. The Effective Date field will populate with the Hearing/Legal Status Date field entered on the Legal Status page. The date can be modified, but cannot be prior to the Hearing/Legal Status Date.

   Note: The Effective Date will be the Begin Date for the Subsidized Guardianship Service created by overnight eWiSACWIS processing.

4. In the New SG Case group box, the Case Type, County, and Site/Region pre-fill from the Maintain Case page. Verify information is correct and click Save.

5. Once Save is clicked for the deactivation, the following pop-up message appears. Click Yes to continue to deactivate.

6. Clicking Yes runs a series of checks to make sure required work is completed and approved, no errors exist, the provider is open with an SG Service, etc. If any information is incomplete, an error message displays. Correct the errors to deactivate the child.

7. If no errors exist, clicking Yes will automatically create a new Subsidized Guardianship case for the child and immediately open the Maintain Case page. This process also automatically creates case assignment for the worker* who deactivated the child. Click Close to return to the desktop.

* Milwaukee Only: assignment is made to the State Subsidized Guardianship Default Worker.

8. The deactivated child is now listed under the Inactive Participants on the family case.

9. While the Subsidized Guardianship case is created immediately after deactivation, information specific to the child does not copy over from the family case until eWiSACWIS overnight processing occurs. This processing also ends the Out of Home Placement in the biological family case and creates a Subsidized Guardianship Service in the Subsidized Guardianship case.

    Prior to overnight processing, access the Subsidized Guardianship case by refreshing the desktop and going to the new Subsidized Guardianship case.

    📁 Bird, Baby (9223840)   Actions
       Subsidized Guardianship   02/03/2014   Supervisor, Test   Ashland - Ashland   122 Highland Ave ,
       Ashland, WI 54806
       🗂 Assets and Income
       📑 Assignment
       ✔ Eligibility
       👫 Related People
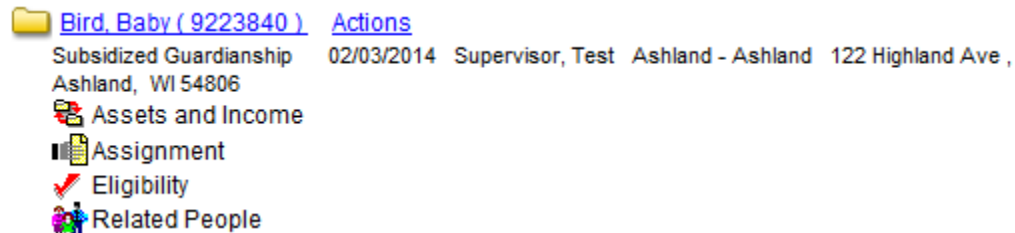
    After overnight processing, information is populated in the Subsidized Guardianship case.

    📁 Bird, Baby (9223840)   Actions
       Subsidized Guardianship   02/03/2014   Supervisor, Test   Ashland - Ashland   122 Highland Ave ,
       Ashland, WI 54806
       🧧 Agreements and Notices
          📜 Subsidized Guardianship Agreement - $495.00
             02/01/2014   Bird, Baby
       🗂 Assets and Income
       📑 Assignment
       ✔ Eligibility
          ✔ Medicaid Eligibility Determination   02/20/2014   Bird, Baby   Approved
          ✔ Subsidized Guardianship Eligibility   02/01/2014   Bird, Baby   Eligible
          ✔ Subsidized Guardianship Funding Determination   02/03/2014   Bird, Baby   Pending
          ✔ Title IV-E Eligibility Determination   08/01/2013   Bird, Baby
          🗄 Trust Account-General   Bird, Baby   Ashland
       📊 Legal
          ⚖ Legal Record
             Bird, Baby   9228471   Guard. to Relative/Caretaker (48.977)
       👫 Related People
       👫 Services
          Open Services
          👫 Service - Subsidized Guardianship
             02/03/2014   Smith, Granny   Bird, Baby   Ashland   Approved

After the Subsidized Guardianship Case is Created

Subsidized Guardianship Continued Eligibility and Related Notices and Decisions
After the Subsidized Guardianship case has been created, it is important to retain primary assignment*
to the case in order to receive case ticklers related to continued eligibility. See the Subsidized
Guardianship Continued Eligibility and Related Notices and Decisions user guide for more information.

* Milwaukee Only: primary assignment is made to the State Subsidized Guardianship Default Worker.

Subsidized Guardianship Amended Agreement
Guardians are eligible to request a Subsidized Guardianship Amended Agreement as early as 12 months
after the initial agreement. See the Subsidized Guardianship Amended Agreement user guide for more
information.

Reopening a Subsidized Guardianship Agreement Ended in Error
Subsidized Guardianship Agreements ended in error may be reopened after termination. See the
Reopening a Subsidized Guardianship Agreement Ended in Error user guide for more information.